Date/Time Stamp:

Employee Post-Travel Disclosure of Travel Expenses

RECEIVED
SECRETARY OF THE SENATE

Post-Travel Filing Instructions: Complete this form within 30 days of returning from PUBLIC RECORDS travel. Submit all forms to the Office of Public Records in 232 Hart Building.

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•	ıle 35.2(a) and (c), I m r me. I also certify that	•		travel expenses that have been o	r w
		rization (Form RE-1), <u>I</u> rtification Form with all		ry, invitee list, etc.)	
Private Sponsor(s) (list	t all): The Heritage	Foundation			
Travel date(s): Octob	er 10-11, 2019				
Name of accompanyin Relationship to Travel					
	COSTS IN EMPLOYEE	EASE DUE TO THE ACC EXPENSES. (Attach addit		JSE OR DEPENDENT CHILD, ONL ry.)	Υ
	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)	
☐ Good Faith Estimate Mactual Amount	\$100.00 - 32 passenger coach bus	\$96.00	\$93.15	\$5.00 - George C Marshall Museum ticket	
Expenses for Accomp	anying Spouse or De	pendent Child (if applie	able):	<u> </u>	1
	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)	
☐ Good Faith Estimate	None	None	None	None	
☐ Actual Amount					
mecessary.): This trip	included a tour of		shall Research lil	Attach additional pages if orary and a full simulation of	!
© © © 0/24/2019	Katherir	ne Thompson		How How	
(Date)	(Printed n	ame of traveler)		(Signature of traveler)	
ФО BE COMPLETE	D BY SUPERVISING	MEMBER/OFFICER:			
	-	es set out above in connection, lodging, and related		escribed in the Employee Pre-Tra	vel
10/24/201	9			くと	

(Revised 1/3/11)

(Date)

(Signature of Supervising Senator/Officer)

Form RE-1

EMPLOYEE PRE-TRAVEL AUTHORIZATION

<u>Pre-Travel Filing Instructions</u>: Complete and submit this form at least 30 days prior to the travel departure date to the <u>Select Committee on Ethics</u> in <u>SH-220</u>. Incomplete and late travel submissions will <u>not</u> be considered or approved. This form <u>must</u> be typed and is available as a fillable PDF on the Committee's website at ethics. senate gov. Retain a copy of your entire pre-travel submission for your required post-travel disclosure.

(Revised 10/19/15)

ETHIC SEP 9'19ph 4:31

Name of Traveler:		Katherine Thompson	n	
Employing Office/Committee		Senator Mik	e Lee	
Private Sponsor(s) (list all):				·
Travel date(s): Note: If you plan to			19	_
Note: If you plan to	extend the trip for any rea	son you <u>must</u> notify the Co	mmittee.	
Destination(s): Lexington,	VA	_		
Explain how this trip is spec	ifically connected to the tr	aveler's official or represe	ntational duties:	
This trip to the Virginia Militar the Yalta conference that will	•	•	diplomacy exercise through a simulation foreign policy/military space.	on of
Name of accompanying fam Relationship to Employee: [• • • • • • • • • • • • • • • • • • • •		<u> </u>	_
I certify that the information $09/09/2019$	contained in this form is t	rue, complete and correct t	to the best of my knowledge:	
(Date)			(Signature of Employee)	
TO BE COMPLETED BY SUI Secretary for the Majority, Secre		-	te, Secretary of the Senate, Sergeant	at Arms,
Senator M	like Lee	K	Katherine Thompson	
(Print Senator's/O)		reby authorize	(Print Traveler's Name)	_
related expenses for travel to	the event described above	e. I have determined that t	or necessary transportation, lodging this travel is in connection with his that he or she is using public off	s or her
I have also determined that to of the Senate. (signify "yes" to 09/09/09	<u> </u>	oyee's spouse or child is ap	propriate to assist in the represent	tation
(Date)		(Signature o	(Supervising Senator/Officer)	

PRIVATE SPONSOR TRAVEL CERTIFICATION FORM

This form must be completed by any private entity offering to provide travel or reimbursement for travel to Senate Members, officers, or employees (Senate Rule 35, clause 2). Each sponsor of a fact-finding trip must sign the completed form. The trip sponsor(s) must provide a copy of the completed form to each invited Senate traveler, who will then forward it to the Ethics Committee with any other required materials. The trip sponsor(s) should **NOT** submit the form directly to the Ethics Committee. Please consult the accompanying instructions for more detailed definitions and other key information.

The Senate Member, officer, or employee MUST also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.

Des	cription of the trip: It is an educational overnight trip to the Virginia Military Institute to provide the
par	ticipants with the opportunity to learn about national security policy through a diplomacy exercise.
Dat	es of travel: October 10-11, 2019
Pia	e of travel: Lexington, VA
Nar	ne and title of Senate invitees: See attached.
l ce	rtify that the trip fits one of the following categories:
X	(A) The sponsor(s) are not registered lobbyists or agents of a foreign principal and do not retain or employ registered lobbyists or agents of a foreign principal and no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee at any point throughout the trip.
	(B) The sponsor or sponsors are not registered lobbyists or agents of a foreign principal, but retain or employ one or more registered lobbyists or agents of a foreign principal and the trip meets the requirements of Senate Rule 35.2(a)(2)(A)(i) or (ii) (see question 9).
X	I certify that the trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.
X	I certify that the sponsor or sponsors will not accept funds or in-kind contributions earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.
	rtify that:
×	The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal except for de minimis lobbyist involvement.
X	The traveler will not be accompanied on the trip by a registered lobbyist or agent of a foreign principal except as provided for by Committee regulations relating to lobbyist accompaniment (see question 9).

9.	USE ONLY IF YOU CHECKED QUESTION 6(B) I certify that if the sponsor or sponsors retain or employ one or more registered lobbyists or agents of a foreign principal, one of the following scenarios applies:
	(A) The trip is for attendance or participation in a one-day event (exclusive of travel time and one overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee on any segment of the trip.
	(B) The trip is for attendance or participation in a one-day event (exclusive of travel time and two overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee on any segment of the trip (see questions 6 and 10).
	(C) The trip is being sponsored only by an organization or organizations designated under § 501(c)(3) of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee at any point throughout the trip.
10.	USE ONLY IF YOU CHECKED QUESTION 9(B) If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel:
	, , , , , , , , , , , , , , , , , , ,
11.	An itinerary for the trip is attached to this form. I certify that the attached itinerary is a detailed (hourby-hour), complete, and final itinerary for the trip.
12.	Briefly describe the role of each sponsor in organizing and conducting the trip: See attached.
13.	Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission: See attached.
14.	Briefly describe each sponsor's prior history of sponsoring congressional trips:
	The Heritage Foundation has a long history of sponsoring congressional travel including trips to the
	historic Gettysburg battlefield, the Virginia Military Institute, and the National Museum of the Marine Corps
	at Quantico.

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l 5.	Briefly describe the educational activities performed by each sponsor (other than sponsoring co trips):		oring congressional		
	The Heritage Founda	ation conducts public poli	cy research, publi	ishes educational repor	ts, and provides
	public seminars to pr	omote discussion of way	s to further our mi	ission. Heritage also ha	s staff throughout
	the country to meet v	vith citizens regarding iss	sues that are being	g debated in governme	nt today.
16.	6. Total Expenses for Each Participant:				
		Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses
	Good Faith estimate	\$100.00 - 32 passenger coach bus	\$96.00	\$100.00 - Lunch, Dinner, Breakfast, Lunch	\$5.00 - George C. Marshall Museum ticket
	Amounts				
17.	State whether a) the trip involves an event that is arranged or organized without regard to congres participation or b) the trip involves an event that is arranged or organized specifically with regard congressional participation: This trip involves an event that is organized specifically with regard to congressional participation.		vith regard to		
18.	Reason for selecting to See attached.	he location of the event	or trip		
			•		
19.	Name and location of Hampton Inn	hotel or other lodging fa	cility:		
	401 E Nelson St, Lex	ington, VA 24450			
20.	Reason(s) for selecting	g hotel or other lodging	facility:		
	The Hampton Inn is	close to the Virginia Milita	ary Institute and is	able to host our group	for a reasonable
	price compared to the	e other options.			

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The Heritage Found	lation conducts public poli	cy research, publi	ishes educational repor	ts, and provides
public seminars to p	romote discussion of way	s to further our mi	ssion. Heritage also ha	s staff throughou
the country to meet	with citizens regarding iss	ues that are being	g debated in governme	nt today.
Total Expenses for E	Each Participant:			
	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses
Good Faith estimate Actual Amounts	\$100.00 - 32 passenger coach bus	\$96.00	\$100.00 - Lunch, Dinner, Breakfast, Lunch	\$5.00 - George Marshall Muse ticket
participation or b) th	trip involves an event that the trip involves an event the pation:	-	-	. —
participation or b) the congressional partici	e trip involves an event th	nat is arranged or	organized specifically w	vith regard to
participation or b) the congressional particition. This trip involves an	e trip involves an event the pation:	ecifically with reg	organized specifically w	vith regard to
participation or b) the congressional particities. This trip involves an Reason for selecting	e trip involves an event the pation: event that is organized sp	ecifically with reg	organized specifically w	vith regard to
participation or b) the congressional particical This trip involves an Reason for selecting See attached.	e trip involves an event the pation: event that is organized sp	ecifically with reg	organized specifically w	vith regard to
participation or b) the congressional particity. This trip involves an Reason for selecting. See attached. Name and location of the congressional particity.	e trip involves an event the pation: event that is organized specified the location of the event of	ecifically with reg	organized specifically w	vith regard to
participation or b) the congressional particical This trip involves an Reason for selecting See attached. Name and location of Hampton Inn	e trip involves an event the pation: event that is organized specified the location of the event of	ecifically with reg	organized specifically w	vith regard to

Desc	transportation will be provided. If first-class fare is being provided, please explain why first-class I is necessary: -passenger coach bus has been chartered.
Desc	ribe the type and class of transportation being provided. Indicate whether coach, business-class or first transportation will be provided. If first-class fare is being provided, please explain why first-class I is necessary: 2-passenger coach bus has been chartered.
class trave	I is necessary:
A 32	
	I represent that the travel expenses that will be paid for or reimbursed to Senate invitees do not include expenditures for recreational activities, alcohol, or entertainment (other than entertainment provided to all attendees as an integral part of the event, as permissible under Senate Rule 35).
the ea	any entertainment that will be provided to, paid for, or reimbursed to Senate invitees and explain why ntertainment is an integral part of the event: e provided.
more	eby certify that the information contained herein is true, complete and correct. (For trips involving than one sponsor, you must include a completed signature page for each additional sponsor):
	e and Title: Thomas Binion, Vice President of Government Relations
	e of Organization: The Heritage Foundation
Addr	214 Maccachusette Avo NE Washington D.C. 20002
	ohone Number: 202-608-6188
·	Number:
	il Address: thomas.binion@heritage.org

- Nic Adams, National Security Advisor, Office of Senator Joni Ernst
 Katherine Thompson, Legislative Correspondent, Office of Senator Mike Lee
 Michael Callesen, Policy Advisor, Senate Foreign Relations Committee
 Aaron Strickland, Deputy Military LA, Office of Senator Lindsey Graham
- 12) As the sole sponsor, The Heritage Foundation 501(C)(3) is hosting and planning this trip as part of an educational fellowship program. Each year, participants go to the Virginia Military Institute's George C. Marshall Museum for a simulation of the Yalta Conference. The participants will learn about the past decisions of national security policymakers alongside VMI cadets through this simulation exercise.
- 13) We are hosting this trip as per our mission to formulate and promote conservative public policies based on the principles of free enterprise, limited government, individual freedom, traditional American values, and a strong national defense. This trip is to further educate the attendees on national security lessons of the past, and how attendees can apply these national security policy lessons to strategic leadership and grand strategy today.
- 18) Each year, The Heritage Foundation's Marshall Fellowship goes to the Virginia Military Institute where it conducts a diplomacy exercise with a group of VMI cadets. The Virginia Military Institute was selected due to its rich history and access to military experts and is an ideal place to utilize as a national security policy education and diplomacy exercise site.

7:00 a.m.

Breakfast and Check-out

Yalta Simulation

Thursday – Friday, October 10-11, 2019 The Marshall Foundation, Lexington, VA

Thursday, October 10, 2019

10:00 a.m.	Meet and Load Luggage	Heritage Lobby
10:30 a.m.	RMA Bus Departs from Heritage	
10:30 - 2:00 p.m.	Travel to Lexington, Virginia	
12:00 p.m.	Stop at Subway for Lunch 491 W Reservoir Rd. Woodstock, VA	
2:00 – 3:30 p.m.	Arrive at Marshall Museum for Tour 1600 VMI Parade, Lexington, VA *This helps participants understand the significance of General General Contribution to establishing American grand strategy; especially dutine period in which the Yalta Conference took place.	• •
3:30 p.m.	Museum Tour Ends/Depart for the Hampton Inn & Check-in Hampton Inn, 401 E Nelson St, Lexington, VA 24450	
4:15 p.m.	Bus will take Fellows back to The Marshall Museum 1600 VMI Parade, Lexington, VA	
4:30 – 6:00 p.m.	Fellows meet with Cadets on campus to discuss strategies for the significant at Southern Inn Restaurant. *The participants will meet with the VMI cadets for the first time in preparations for Friday's simulation event. Each cadet will then preparation project that relates to the historical context of the 1945 Y an analysis of German war reparations, the partitioning of Poland,	order to begin their esent his/her alta Conference (e.g.
6:00 p.m.	Reception/Dinner at Southern Inn Restaurant 37 South Main Street, Lexington, VA 24450	
6:30 p.m.	Dinner *Professor Dennis Foster, VMI faculty member, will give remarks s for the Yalta Conference Simulation occurring the next day. Cadets the dinner and discussion.	•
8:00 p.m.	Dinner Concludes - Fellows/Cadets can choose to continue meeting evening	or adjourn for the
	Friday, October 11, 2019	

Hampton Inn

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7:45 a.m. Load Luggage onto the Bus 8:00 a.m. Bus Departs from the Hotel for the Marshall Museum 8:30 a.m. Yalta Simulation Begins Auditorium* 8:30 am - Plenary Session 1 8:30-8:35 - Call to order - Welcoming Remarks USSR 8:35-8:40 – Opening statement Great Britain 8:40-8:45 – Opening statement United States 8:45-8:50 — Opening statement USSR 8:50-9:20 - Consultations 9:20-9:50 - Breakout Negotiations 9:50-10:15 - Consultations 10:15 am - Plenary Session 2 10:15-11:15 - Breakout Negotiations 11:15-11:35 - Consultations 11:35-12:00 - Remarks from each country - where they stand 12:15 pm - Plenary Session 3 - Perceptions of the three delegations of where there is agreement and differences 12:15-12:20 - Closing Statement USSR 12:20-12:25 - Closing Statement United States 12:25-12:30 - Closing Statement Great Britain 12:30 p.m. Simulation Concludes 12:30 p.m. Luncheon (to be setup outside of the main room) Auditorium Lessons Learned Discussion Luncheon Concludes 2:00 p.m. Bus Departs from the Marshall Museum 2:15 p.m. 2:30 p.m. Travel to The Heritage Foundation. 5:30 p.m. Bus Arrives at Heritage 214 Massachusetts Ave NE, Washington, DC

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Subject:

2019 George C. Marshall Fellowship

Date:

Thursday, February 7, 2019 at 12:50:11 PM Eastern Standard Time

From:

Palumbo, Brandon on behalf of Spoehr, Thomas

To:

CC:

Thompson, Katherine (Lee)

Attachments: 2019 Marshall Fellowship Calendar.pdf

Dear Katherine,

Congratulations! It is with great pleasure that we accept you into the George C. Marshall Fellowship Class of 2019.

The fellowship will commence on Friday, March 22nd with an orientation session at The Heritage Foundation's 227 Pennsylvania Avenue SE building. Attached you will find the 2019 calendar of events. Through your acceptance, you are agreeing to attend all sessions and trips. For Congressional and Senate staff, we will contact you directly to provide you with all forms necessary for Ethics Committee compliance on all trips.

If you have any questions or concerns, please do not hesitate to reach out to Brandon Palumbo at brandon palumbo@heritage.org or at 202-675-1784.

Congratulations again, and we look forward to welcoming you into the Marshall Fellow community!

Sincerely,

Thomas Spoehr

Director, Center for National Defense
The Heritage Foundation
214 Massachusetts Avenue, NE
Washington, DC 20002
202-608-6074
heritage.org